

The claims defining the invention are as follows:

1. A smart folder for a particular set of documents or records in a document management system, which have a unique identity, which smart folder is associated with software means for handling the documents or records in a generally automated manner which is in accordance with a known set of rules associated with those documents or records.
2. A smart folder as claimed in claim 1 in which the folder can contain at least one document or record.
3. A smart folder as claimed in claim 1 or claim 2 which is treated like any document or set of documents and has a unique identity and can have document metadata associated with it including document type, status, keywords and custom properties.
4. A smart folder as claimed in claim 3 which can have permissions assigned to it which determine which users can modify or browse the folder, have access to its contents and add documents to the folder.
5. A smart folder as claimed in claim 4 which can also be declared as a record and have record retention information assigned to it as is possible with any document in the system.

6. A smart folder as claimed in claim 5 wherein an individual record's retention information can be overridden with different retention information if so required.
7. A smart folder as claimed in claim 6 which has a templating function which allows the owner of the smart folder to specify what document metadata and permissions are assigned to any documents stored in the folder such that users with appropriate permissions can save documents into the folder.
8. A smart folder as claimed in claim 7 wherein the metadata and permissions specified in the template are applied to the documents on entry.
9. A smart folder as claimed in claim 8 wherein every document contained within a smart folder maintains a pointer to its parent folder.
10. A smart folder as claimed in claim 9 wherein if a smart folder is declared a record then all documents contained in the folder are also declared as records.
11. A smart folder as claimed in claim 10 wherein the retention of documents is driven by the retention information of their parent folder such that once the time specified for a document to be retained has elapsed it can be automatically removed.
12. A smart folder as claimed in claim 11 which may become due for disposal when all contents of the folder are due.

13. A smart folder as claimed in claim 12 wherein the folder cannot be disposed of when it reaches its retention date if there is any document in the folder which has not reached its retention date.
14. A smart folder as claimed in claim 13 wherein when the folder is disposed of all the contents of the folder are also disposed of.